

U.S. Department of Energy
Employee Self Service



Key to Your Information Universe

**Project Management Career Development
Program**

ESS Tutorial

November 2005

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Introduction

The Project Management Career Development Program (PMCDP) has been developed in response to recommendations by the National Academy of Science's National Research Council as contained in their report, *Improving Project Management in the Department of Energy* (June 1999). In a January 17, 2001 memorandum, the former Deputy Secretary directed the Office of Engineering and Construction Management (OECM) within the Office of Management, Budget, and Evaluation to develop the PMCDP. The development of the PMCDP supports the President's Management Agenda in the area of Strategic Human Capital Management. The implementation of this program will considerably strengthen the capability of the Department's project management workforce and will thereby enhance the Department of Energy's (DOE's) ability to successfully perform projects.

PMCDP Participants

The PMCDP applies to all incumbent DOE federal project directors, employees desiring to be on a project management career path, and others whose positions require them to provide management direction, oversight, or matrix support to DOE federal project directors.

PMCDP Certification

There are four levels of certification in the PMCDP. Each level has associated competencies (supporting knowledge and skills). Participants have access to all competencies associated with the program. Fulfillment of a competency may be obtained by (1) declaring an equivalency, or (2) declaring the competency as a developmental need, and then completing the associated training or developmental activity. The participant must choose an approving official, such as a supervisor/manager, office/site manager, or subject matter expert, to approve the participant's attainment of a competency. Participants should follow site/office specific policy and procedure for designation of approving officials. Use of a subject matter expert to approve a competency is optional and must be delegated or directed by the cognizant program secretarial office or field office manager. When a participant has completed entering information for a PMCDP competency, an electronic mail message is automatically generated and sent to the participant's approving official who reviews the competency information. Based on the information provided by the participant, the request is approved, disapproved, or designated as pending.

Waivers can only be requested for fulfillment of whole level competencies, not single competencies. If a waiver has been requested, the site/field office manager and OECM must approve the waiver as well. Participants can obtain approval for a competency at any level.

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PMCDP Certification (continued)

Certification for a level can only be obtained when approval has been granted for all competencies within a level (i.e., all 21 competencies must be approved to obtain Level 1 certification and Level 1 certification must be approved prior to obtaining Level 2 certification). A certification request form must be completed and sent to the appropriate approving officials, as well as the site/office manager.

Equivalency for a Competency

An equivalency is defined as possessing the necessary skills and knowledge for competency in the area, gained through previous coursework, on the job training, and/or experience. PMCDP emphasizes project management development and experience. Entry of detailed experiential and training information must be included for each competency.

Association with PMCDP

The PMCDP training module resides on the Corporate Human Resource Information System (CHRIS). Therefore, you must be associated with the module by your appropriate human capital management personnel, rather than through your training coordinators.

Site personnel should contact their supervisor and/or their administrative officer and request to be associated with the PMCDP. The human capital representative should follow site procedure for associating personnel in CHRIS.

Headquarters personnel should contact their respective office supervision and request to be associated with the PMCDP. The supervisor should follow the Program Element procedure for associating personnel in CHRIS.

Generally, person(s) with administrator access at your site/program office that have authority to make changes to your Employee Self Service (ESS) account must manually associate your job position number to the PMCDP module.

Employee Self Service

The ESS web site supports the PMCDP by providing a central repository and tracking system on matters related to PMCDP training and certification. Employees can update/review their individual competencies, request PMCDP certification, and request continuing education (CE) credit hours using ESS. Supervisors, managers, and/or subject matter experts can review and approve competencies and certification requests through ESS.

ESS Web Site

Tutorial Purpose

This document has been developed to assist participants in using ESS for managing their participation in the PMCDP.

1. Access the ESS web site: <https://mis.doe.gov/ess>
 2. Click on “Login.”
 3. Enter your SSN or CHRIS Employee ID and password.
 4. Click on “Authenticate Me.”
-

Entering the PMCDP Module

1. Click on the tab at the top of the page marked "PMCDP." If you receive an error message stating that you are not associated with the PMCDP, see your immediate supervisor or administrative officer to discuss your site/office procedures for enrollment in the program. (See "Association with the PMCDP," page 2 of this tutorial).

2. Menu Options

Click on the tab marked "PMCDP" for a listing of available options in the module.



Introduction: You may view a brief narrative introduction targeted to either PMCDP participant or the applicable approving official.

Project Management Career Development Program for

For PMCDP participants:

- Click on 'Set PMCDP profile' in the PMCDP menu to enter your project management experience, project history and any additional supporting information.
- After your profile is updated, click on 'Review/update competencies' in the PMCDP menu to develop or justify core PMCDP competencies.
- Click on 'Supervisor/Site Review Report' to view the full report needed for CRB certification.
- Once you have completed competencies requirements at a particular level, use the 'Certification Request Form' to request an interview and managerial approval for your level of certification.

For designated approving officials/managers:

- Click on the appropriate link to approve employees' competency or certification requests for approval.

Instructions: You may view the tutorial for the PMCDP CHRIS/ESS module.

(Continued on next page)

Entering the PMCDP Module (continued)

Menu Options (continued)

Certification and Equivalency Guidelines: You may view the most current version of the PMCDP certification guideline.

Set PMCDP Profile: The first step in the entry of PMCDP information. Before entering individual competencies, all PMCDP participants must first establish their profile. You will enter information regarding your project history, your participant category, your program office, and your approving official(s).

Maintain Project History: The second step in the entry of PMCDP information. You will enter your current and past project history relevant to project management. You may enter as many projects, going back in time, as you wish. At a minimum, you must enter at least the last ten years of your project history. You are encouraged to enter all project management experience, so that the breadth of your experience will be made known to the certifying official and the PMCDP Certification and Review Board.

Enter Supporting Information: The third step in the entry of PMCDP information. The use of the notepad is optional. A 4,000-character notepad has been provided for you to enter any additional or clarifying information. This is in addition to provided comment boxes for each competency.

Review/Update Competency: Once you have entered your initial profile information, you may update it at any time. Major changes will require the updated information to be approved by your chosen approval official.

Supervisor/Site Review Report: All of the data entered under project history and competencies will be placed into this report. This report is the document that will be presented to the PMCDP Certification and Review Board for consideration of your certification.

Competency Status Report: This report lists all PMCDP competencies, summarizes all the information you have entered, and the approval status of all competencies.

Equivalency Summary Report: This report will list all the PMCDP competencies and the equivalency justification that you have entered for each item.

Waiver Summary Report: This report will list all the PMCDP competencies and the information that you have entered for each item. This must accompany any request for a waiver of an entire certification level.

(Continued on next page)

Entering the PMCDP Module (continued)

Menu Options (continued)

Certification Request Form: This electronic form must be completed and submitted electronically to the approving official(s) and OECM in order to be considered for certification by the Certification and Review Board.

CE Hour Request Form: Certified federal project directors are required to maintain their certification through continuing education. The requirement is for 60 CE hours every two years. This electronic form must be completed and submitted electronically to the approving official(s) and OECM in order to be granted CE hours towards the continuing education requirement.

PSO Certification Request Review Form: Once the site/office manager approval has been obtained, the Program Secretarial Official (PSO) should be notified that the profile is ready to be presented to the PMCDP Certification Review Board. Most PSOs require notification. If a PSO does not require such notification, the participant is required to select “No program official (PSO) notification/review required” on this form.

Approving Official/Manager Options:

Review/Approve Employee Competencies: The approving official is required to respond to all requests for a competency review. The approving official may approve, disapprove, or put it on hold, pending further review and/or evaluation.

Review/Approve Certification Level Requests: The approving official is required to respond to all requests for certification. The approving official may approve, disapprove, or put it on hold, pending further review and/or evaluation.

General Comments: The site/office manager (approving official) has the option to enter comments in the “General Comments” section at the bottom of the first page of the Supervisory/Site Review Participant Profile. However, if the certification request is disapproved, comments are required. It is recommended that comments be made if “pending” is chosen, to delineate the issue(s) and establish an anticipated resolution date. Comments may be entered no matter what status is chosen.

Step 1, Background Information

Before entering individual competencies, you must first establish your profile and enter your background information.

1. Click on the “PMCDP” menu item at the top of the page.
2. Select “Set PMCDP profile.”
3. Project management experience from any source will be considered towards your PMCDP experiential requirements. The only required experience entry is for time spent as a project manager/director for DOE. Other federal agencies, and private sector experiences are optional.

Step 1: Enter background information

Instructions (updated 12/02/2004): Enter your total years of project management experience 1) within DOE, 2) in other federal agencies and 3) in the private sector, along with your current PM applicant category status and your PSO. You also need to select your site's manager as well as your direct first line manager. Click on the “Save and Continue” button at the bottom of this form when finished. You will then be directed to the project history update page.

*-Required fields

Years of project management experience - DOE:*	<input type="text" value="5"/>
Years of project management experience - other federal agencies:	<input type="text" value="6"/>
Years of project management experience - in private sector:	<input type="text" value="7"/>
Applicant Priority category:*	<input type="text" value="Project Management Candidate"/>
Program Secretarial Office (PSO)/Staff Office:*	<input type="text"/>
Overall site/office manager:*	<input type="text"/>
First line manager:*	<input type="text"/>

4. To enter your project history, please do the following:
Enter the number of years of project management experience in the “Years of project management experience - DOE” field (required).
5. Enter the number of years of project management experience in other federal agencies in the “Years of project management experience – other federal agencies” field, if applicable (optional).

Step 1, Background Information (continued)

6. Enter the number of years of project management experience in the private sector in the “Years of project management experience – private sector” field, if applicable (optional).
-

7. You are required to select a priority category, i.e. an incumbent project director, a candidate, or other. Click the down arrow to the right of “Applicant Priority category” field to display a list of choices. Select the appropriate choice.

Project Management Candidate is defined as someone aspiring to a project management career as a federal project director, or who previously held such a position, but who does not currently have a project for which he or she has been assigned primary responsibility (e.g., deputy project directors, assistant project directors, integrated project team members, and others who may desire or are encouraged to attain federal project director certification).

Project Management Incumbent is defined as someone who is currently assigned as the federal project director with primary responsibility for a capital asset project.

Other is anyone who is taking courses, but has not been formally identified by management as an incumbent or candidate.

8. Select your PSO/staff office.” Click the down arrow to the right of “Program Secretarial Office (PSO)/Staff Office” field to display a list of choices (required). Choose one.
-

9. Select your overall site/office manager. Click the down arrow to the right of “Overall site/office manager” field to display a list of choices (required). Choose one.
-

10. Select your first line manager. Click the down arrow to the right of “First line manager” field to display a list of choices (required). Choose one.
-

11. Select “Save and continue.”
-

Step 2, Project History

You must now enter your project history information. At a minimum, you must enter information for individual DOE projects you are currently working or have worked on over the past ten years (or less) and any future projects on which you anticipate that you will work beginning within the upcoming year.

1. Once you have completed the background information, you will be taken to an initial project history page titled: “Step 2: Maintain project history.”

It will state: “You have not entered any projects.” Click on “Add another project.”

PMCDP Profile for

Step 2: Maintain project history

The CRB requests that certification candidates please identify the following information for individual projects on which certification candidates are currently working or have worked on over the course of the past 10 years (if certification candidates wish to additionally identify projects worked on prior to 10 years ago, that is at his/her discretion). In addition, please identify future projects on which you anticipate that you will work beginning within a year.

[Add another project](#) | [Enter additional information](#)

Action	Project Name	Position Title	Total Project Cost (in millions)	Position Start Date	Position End Date	Project Description
[Delete] [Update]	PMCDP	Project Manager	10	09/01/2002		[View description]

[Add another project](#) | [Enter additional information](#)

Step 2, Project History (continued)

2. You will be directed to a screen asking you to “Add a project to your PMCDP profile.”

[Text-only menu](#)

Add a project to your PMCDP profile

* - Required fields

Project name: *	<input type="text"/>
Position title: *	<input type="text"/>
Total project cost (in millions): *	<input type="text"/>
Project start date: * (mm/dd/yyyy format)	<input type="text"/>
Project end date: (mm/dd/yyyy format - leave blank if current project)	<input type="text"/>
Specific role: (4000 character limit)	<div><div></div></div>

3. You will enter each project separately. You may begin at the present time or with your first project managed. Enter the name of the project managed in the “Project name” field (required). Enter your position title during management of the project in the “Position title” field (required).
4. Enter the total project cost in the “Total project cost” field (required).
Note: Whole numbers should be entered; for example, a project with a total budgeted cost of \$147,850 would be rounded up and entered as 148. Costs are represented in millions of dollars.
5. Enter the project start date in the “Project start date” field (mm/dd/yyyy).
6. Enter the project end date in the “Project end date” field (mm/dd/yyyy). Leave this field blank if this is a current project.

Step 2, Project History (continued)

7. For each project, enter your start and end date of your tenure and information on your project director roles and responsibilities in the “Specific role” field. Also include location and current decision/project phase. If the project is not a DOE funded project, then please include the name of the organization/company and brief description of project. For current projects, please indicate the start date (mm/dd/yyyy) - present. This field has a 4,000-character limit.

Specific role: Identify your specific project role(s) (e.g., project director, project manager, integrated project team member, program director, office director, program manager, COR, scientist, engineer, architect, etc.) and very briefly describe project management activities that you conducted or are conducting in relation to your role in the project. Also describe in detail your specific involvement during project life cycle (e.g., served as project manager from project design through closeout, served as project engineer during project closeout, served as COR/COTR for years three and four during the seven year project life cycle, served as site supervisor for six months during the third year of the five-year project, as project scientist/engineer/program representative, served in the capacity of the project director during pre-project planning stages for one-year, etc.).

Detail the type of project, such as remediation, design/build, GPP, line item capital project, operating funded projects (including Major Items of Equipment), etc., the CD phases the project progressed through while you were assigned, whether you were the only project director or shared responsibility with other project directors assigned to the project, if you were one of many assigned to the project, what were the specific areas for which you were responsible during the life cycle of the project, were you preceded or followed by other project director(s) (e.g., served as project manager during CD-0 through CD-1 from 7/95 through 9/97; served as project engineer during project closeout from 1/03 through 9/03; serve as federal project director during CD-4 project closeout from 9/03 to present; or took the project through CD-0, and then were followed by others for the completion of the project, or took the project from CD-1 through CD-3 only and then others took it to completion).

-
8. Click on the “Save changes” button after entering all the required information.
-
9. A screen summarizing your project history will appear stating that your profile information has been added. Review the information and choose to update, delete, enter another project, view the project description, enter additional information, review/update competencies, or choose another option from the PMCDP Menu.

(Continued on next page)

Step 2, Project History (continued)

[Text-only menu](#)

PMCDP Profile for

Step 2: Maintain project history

Sorted by date (Click on underlined column headings to change sort order)

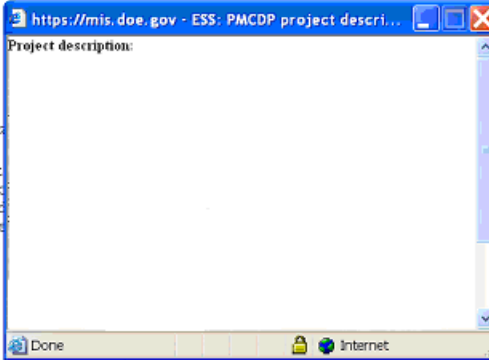
The CREB requests that certification candidates please identify the following information about individual projects on which certification candidates are currently working or have worked over the course of the past 10 years (if certification candidates wish to additionally identify projects worked on prior to 10 years ago, that is at his/her discretion). In addition, please identify future projects on which you anticipate that you will work beginning within a year.

Your project has been added.

[Add another project](#) | [Enter additional information](#)

Action	<u>Project Name</u>	<u>Position Title</u>	<u>Total Project Cost (in millions)</u>	<u>Position Start Date</u>	<u>Position End Date</u>	<u>Project Description</u>
[Delete] [Update]	Project Future Forward	Project Manager	14785	02/07/2003	02/27/2007	[View description]
[Delete] [Update]	Villa Verde housing project	Project Manager	13	06/01/1969	04/01/1998	[View description]

[Add another project](#) | [Enter additional information](#)



Update project information: Under the column titled “Action,” click on the “Update” key. This will present a screen titled: “Update a project in your PMCDP profile.” Enter updated information. Choose “Save changes.” If you change your mind, you may choose “Clear changes.”

Delete information: Under the column titled “Action,” click on the “Delete” key. All the information that you have chosen to delete will be displayed and you will be requested to confirm the deletion or to cancel the action. Choose “Yes” or “Cancel.”

View project description: Under the column titled “Project Description,” click on “View description.” A pop-up text box with the information that you previously entered, if any, in the “Project Description” field will appear on the screen.

Add another project: Click on the link “Add another project.” Continue entering all other relevant projects by repeating steps 1 through 8. There is no limit to the number of projects that you may enter.

Enter additional information: Click on the link “Enter additional information.” You will be taken to the “Supporting Information” screen where you can enter additional or clarifying information. Click on “Save Changes.”

10. You will be taken to a summary screen listing all the projects you have entered. You may update or add another project. Click on the appropriate link.
11. If you are finished entering your project history, you should move to Step 3 by choosing “Supporting Information” from the PMCDP menu.

Step 3, Supporting Information

The use of the notepad is optional. A 4,000-character notepad has been provided for you to enter any additional or clarifying information. This is in addition to comment boxes for each competency.

1. From the PMCDP menu, choose “Supporting Information.”

A text box will be presented. You may type directly into the text box or “cut and paste” information from other documents.

PMCDP Profile for

Step 3 (optional): Enter additional information

Enter any supporting information concerning your PMCDP certification (4000 character limit). The text will be appended to your “Supervisor/Site Review Report”.

Click on “Save Changes” to save your data.

Last updated:



Save Changes

Clear Form

Click on “Save Changes” whether you have entered information or not.

Step 3, Supporting Information (continued)

2. You will be presented with a screen notifying you that all your profile has been updated. You will be offered the opportunity to begin assessing your competencies or to view the Supervisor/Site Review Report. Choose the applicable “Click here” link.

PMCDP Profile for

Your profile has been updated.

You can go back at any time and add or update your profile information by clicking on the appropriate items in the PMCDP menu.

If you want to start assessing your PMCDP competencies, [click here](#).

If you want to view the report that will be presented to the Certification Review Board (CRB) during your consideration for certification, [click here](#).

Updating Your Project History

Updating Your Project History

1. To update your project history, click on the “PMCDP Menu” and choose “Maintain project history.” Click on “Update” or “Delete” under the “Action” column, or “View description” in “Project Description” column.

*PMCDP Profile for***Step 2: Maintain project history**

The CRB requests that certification candidates please identify the following information for individual projects on which certification candidates are currently working or have worked on over the course of the past 10 years (if certification candidates wish to additionally identify projects worked on prior to 10 years ago, that is at his/her discretion). In addition, please identify future projects on which you anticipate that you will work beginning within a year.

[Add another project](#) | [Enter additional information](#)

Action	<u>Project Name</u>	Position Title	<u>Total Project Cost (in millions)</u>	Position Start Date	Position End Date	Project Description
[Delete] [Update]	PMCDP	Project Manager	10	09/01/2002		[View description]

[Add another project](#) | [Enter additional information](#)

2. Project history information is presented in date-order, with the most recent position date first. You may sort your project history information by the project name or total project cost. To change sort order, click on the underlined column heading.
3. Under the “Action” column, click on “Update.” A screen detailing the project information will be displayed. Update as necessary. Click on “Save changes.”

Update a project in your PMCDP profile

Project name:

Position title:

Total project cost (in millions):

Project start date:

Project end date: (leave blank if current project)

Project description: (4000 character limit)

Updating Your Project History

4. A screen with the header “PMCDP for [Your Name]” will appear stating that your profile has been updated.

[Text-only menu](#)

PMCDP Profile for

Your profile has been updated.

You can go back at any time and add or update your profile information by clicking on the appropriate items in the PMCDP menu.

If you want to start assessing your PMCDP competencies, [click here](#).

If you want to view the report that will be presented to the Certification Review Board (CRB) during your consideration for certification, [click here](#).

Initial Entry of Competency Information

Initial Entry of Competency Information

1. Once all your background information, project history, and any supplemental information have been entered, you may begin entering your competency information.

You may begin from the PMCDP Menu or from the initial Profile Update Notification screen presented when you completed Step 3.

PMCDP Menu: Click on “PMCDP” and choose “Review/Update Competencies.”

Profile Update Notification Screen: After you have finished entering all your initial information, choose “If you wish to start assessing your PMCDP competencies, click here.”

2. The competency page is divided into the following areas.

	Competency ID (click for description)	Competency Status					Justification or Comments
		Developmental Need			Equivalency/ Requirements Met	Waiver	
		Activity Type	Targeted Completion Date	Actual Completion Date			
Update this item	1.1.1	College Course					
Update this item	1.1.2				PMCDP Training		View comments
Update this item	1.1.3				Education & Experience		View comments
Update this item	1.2.1						
Update this item	1.3.1				Education & Experience		View comments
Update this item	1.4.1						
Update this item	1.6.1						
Update this item	1.6.2						

Update this Item: Click on this link to enter or update information.

Competency ID number: All 77 competencies (including training electives), developmental activities, and behavioral skills are listed in numerical order.

The identification number is the same as the identification number in the PMCDP Certification and Equivalency Guide and the Supervisory Review/Participant Profile. You may review the competency statement by clicking on the underlined numerical ID.

Competency Status: In this section you will choose whether the competency is a developmental need, if you have equivalent training, education, and/or experience, or if you are requesting a waiver for this competency and all the others in that level. See steps 3 through 31 below.

(Continued on next page)

Initial Entry of Competency Information

2. The competency page is divided into the following areas (continued):

Justification or Comments: Enter clarifying or additional information that will assist your approval official and the Certification and Review Board in evaluating your competency in this area. See steps 8, 14 and 24 below.

3. **Competency Status**

You must enter information for “Competency Status” for each competency listed. Begin by choosing the competency you wish to address. Click on “Update this item.”

Competencies require demonstrated ability at three levels. Demonstrated ability is defined as the actual performance of a task or activity in accordance with policy, procedures, guidelines, and/or accepted industry or Department practices.

- Familiarity-Level: Basic knowledge of, or exposure to, the subject or process adequate to discuss the subject or process with individuals of greater knowledge.
 - Working-Level: Knowledge required to monitor and assess operations/activities, to apply standards of acceptable performance, and to reference appropriate materials and/or expert advice as required to ensure the safety of project activities.
 - Expert-Level: Comprehensive, intensive knowledge of the subject or process sufficient to provide advice in the absence of procedural guidance.
-

4. A screen will appear displaying your name and the competency number. Select a status by clicking the down arrow to the right of “Select a Status.” Three choices will be displayed. Select one from the list.

“**Developmental need**” is a competency that is required for certification or job description and the participant does not currently possess all (an acceptable level) of the knowledge and/or skills required for a competency. (See steps 6-12 below)

“**Designation of equivalency**” allows you to identify prior training, and or experience that gave you the required knowledge, skill and or ability for this competency. (See steps 13-22 below)

“**Waiver**” can only be applied to a whole level. (See steps 23-31 below)

5. Click on “Continue.”
-

Initial Entry of Competency Information

6. Competency Status: Developmental Need

A screen displaying your name and the competency number that you are updating, and the competency designation selection = Developmental Need will be presented.

You are now required to enter information on the type of developmental need you have chosen, the targeted/actual completion dates, and justification or comments that may assist your approval official.

Developmental need is the description of the activity from the given listing that best describes your intended course of action to meet the competency.

Targeted Completion Date is the date (month/year) that you anticipate completing this competency.

Actual Completion Date is the date (month/day/year) at which you completed the training and/or experiential activity for this competency.

[Text-only menu](#)

PMCDP FOR

Updating competency = [1.4.1](#)
Competency designation selection = Developmental Need

*-Required fields

Competency Status*			Justification or Comments (2000 character limit)
Developmental need	Target Completion Date (mm/yyyy)	Actual Completion Date (mm/dd/yyyy)	
-- Select a developmental need -- -- Select a developmental need -- Certification/License College Course Equivalent Training Course Mentoring On-the-job Training Oral Board Review Other PMCDP Course Rotational Assignment Self Study Written Examination			

Click the down arrow next to “Developmental need” column to view the list of choices. Choose one of the following:

Certification/License	On-the-job training	Rotational Assignment
College Course	Oral Board Review	Self Study
Equivalent Training Course	Other	Written Examination
Mentoring	PMCDP Course	

Initial Entry of Competency Information

7. Enter the “Targeted Completion Date” (mm/yyyy).
You will update this information with the actual completion date once you have completed the developmental need.
8. You may choose to enter justification or comments to assist your approval official. Enter applicable information in column titled “Justification or Comments.”
9. Click on “SUBMIT.”
10. You will be brought to a screen summarizing the information you have entered.
You may choose to update your IDP, update another competency, or re-edit this competency.
IDP Update: Click on “IDP” on the top menu, choose “Update current IDP” to process your IDP.
Update another competency: Click on “Update another competency” to continue adding information to your core competencies.
Re-edit this competency: This will take you back to the previous screen where you can edit the information.

[Text-only menu](#)

PMCDP FOR

Competency ID: 1.1.1
Developmental need: College Course
Target date: 03/2005
Completion date: 03/10/2005
Comments: Completed course at University of Maryland,
Project Management for Leaders.

[\[Update another competency\]](#) | [\[Submit for approval\]](#)
[\[Re-edit this competency\]](#)

-
11. Click on “Submit for approval.”
 12. To request a developmental need for another competency, click on “PMCDP Menu,” “Review/Update Competencies” and follow steps 2-11.
-

Initial Entry of Competency Information

13. Competency Status: Equivalency/Requirements Met

If you have prior training, education or experience that satisfies the knowledge, skills and abilities for a competency, you may request it as an “Equivalency.”

A screen displaying your name and the competency number that you are updating, and the “Competency designation selection = Equivalency” will be presented.

In the column “Competency Status,” “Equivalency type” click the down arrow to the right of “Select an equivalency” to display a list of options. Choose one.

PE or RA license	PMCDP training	PMI PMP
Oral exam	Education and Experience	Other
TQP certification	Experience	Written Exam
Training or Education Completed		

[Text-only menu](#)

PMCDP FOR

Updating competency = [1.6.1](#)
Competency designation selection = Equivalency

*-Required fields

Competency Status*	Justification or Comments (2000 character limit)*	Verification Method*
<i>Equivalency type</i> -- Select an equivalency -- -- Select an equivalency -- Education & Experience Experience Oral Exam Other PE or RA License PMCDP Training PMI PMP TQP Certification Training or Education completed Written Exam		-- Select a verification method --

14. It is required that you enter information that supports your request for having equivalent knowledge, skills, and abilities for this competency in the “Justification or Comments” field (2000 character limit). Please provide the details for experiential and training information, the numbers of your Project Management Institute Project Management Professional certification, Professional Engineer and/or Registered Architect license, and date/state of issuance.

Initial Entry of Competency Information

15. Equivalencies should be verifiable. Click the down arrow to the right of “Select a verification method” field to view a list of choices. Select the appropriate method for verification of the knowledge, skills, and abilities associated with the competency. Choose one of the following.

Written Exam	Qualifying Official
Course Completion Certificate	Interview
No Documentation	Professional Certificate/License
Transcript	On-the-Job-Training
Position Description	Observed
SME (Subject Matter Expert)	Oral Board

PMCDP FOR

Updating competency = [1.6.2](#)
Competency designation selection = **Equivalency**

*-Required fields

Competency Status*	Justification or Comments (2000 character limit)*	Verification Method*
<i>Equivalency type</i>		
PMCDP Training	PM Systems and Practices in DOE. Completed 07/2004	-- Select a verification method -- -- Select a verification method -- Course Completion Certificate Course Evaluation Interview No Documentation Observed On the Job Training Oral Board Position Description Professional Certificate/License Qualifying Official SME Transcript Written Exam

16. Click on “SUBMIT.”

Initial Entry of Competency Information

17. A summary page detailing your choices will appear. You can accept these inputs and submit this equivalency for approval, edit the information, or update another competency. Click on one option.

PMCDP FOR

Competency ID: 1.1.1

Equivalency type: Education & Experience

Verified by: Course Completion Certificate

Comments: vvvvvvvvvv

[\[Update another competency\]](#) | [\[Submit for approval\]](#)

[\[Re-edit this competency\]](#)

Submit for approval: This will generate an electronic message to the approving official you select requesting approval for this competency.

Re-edit this competency: This will bring you back to the original input screen for your update.

Update another competency: This will bring you back to the “Review/Update Competency” screen where you can select another competency to update.

18. **Submit for Approval**

Click on “Submit for approval” button.

19. A screen with the header “PMCDP for [Your Name]” and the number of the competency will appear. Click the down arrow to the right of “Select an approving official” to display a list of names. Choose one.

Choice of an approving official must be in accordance with your program office policy and procedure.

[Text-only menu](#)

PMCDP FOR

Competency ID = [1.1.1](#)

Please select an approving official for this competency record:

-- Select an approving official --

Continue

-
20. Click on “Continue.”
-

Initial Entry of Competency Information

21. A screen with the header “PMCDP for [Your Name]” and the number of the competency will appear. The name you have selected and the email address of this person will be displayed. You may send or cancel the competency review request. Click on one.

Send for approval: This will automatically send an email message to the approving official informing them that this competency is ready for review.

Cancel request: You will be returned to the “Review/Update Competency” screen.

The screenshot shows a web interface titled "PMCDP FOR". Below the title, it says "Competency ID = 162". A note states: "This function will send an email message to the designated approving official, informing them that this competency is ready for review." Below this, there are labels for "Designated approving official:" and "Email address:". At the bottom, there are two buttons: "Send for approval" and "Cancel request".

-
22. If you send for approval, a screen titled “PMCDP Competency Summary for [Your Name]” will be presented. It will state “Email has been sent to the designated approving official.”

You may review your competency information and update if necessary.

23. **Competency Status: Waiver**

A participant may request a waiver for a whole certification level; waivers may not be requested for individual competencies within a level. The waiver request will be sent to the supervisor/manager and the site/field manager and if approved, sent to OECM for their approval. It is expected that waiver authority will be used only in rare and unusual circumstances.

Select status “Waiver” and click on “Continue.”

24. A screen displaying your name and the competency number that you are updating, and the “Competency designation selection = Waiver” will be presented. In the column “Justification or Comments” enter applicable information.
-

25. Click on “SUBMIT.”
-

Initial Entry of Competency Information

26. A summary screen titled “PMCDP for [Your Name]” will be presented.

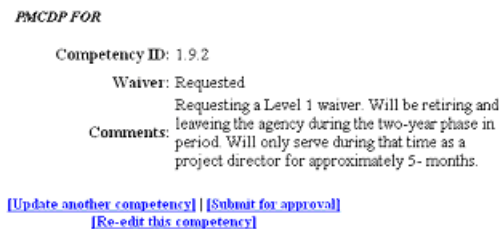
This summary screen will detail your name, the competency you are addressing, and the justification/comments that have been entered.

You have the following options: accept these inputs and submit this waiver for approval, edit the information, or update another competency. Click on one option.

Submit for approval: This will generate an electronic message to the manager you select requesting approval for this competency waiver.

Re-edit this competency: This will bring you back to the original input screen for your update.

Update another competency: This will bring you back to the competency summary page where you can select another competency to update.



PMCDP FOR

Competency ID: 1.9.2

Waiver: Requested

Comments: Requesting a Level 1 waiver. Will be retiring and leaving the agency during the two-year phase in period. Will only serve during that time as a project director for approximately 5- months.

[\[Update another competency\]](#) | [\[Submit for approval\]](#)
[\[Re-edit this competency\]](#)

-
27. **Submit for approval:**

Click on “Submit for approval.”

28. A screen with the header “PMCDP for [Your Name]” and the number of the competency will appear. Click the down arrow to the right of “Select an approving official” to display a list of names. Choose one.

Choice of an approving official must be in accordance with your program office policy and procedure.



PMCDP FOR

Competency ID = [1.1.1](#)

Please select an approving official for this competency record:

-- Select an approving official --

Continue

-
29. Click on “Continue.”
-

Initial Entry of Competency Information

30. A screen with the header “PMCDP for [Your Name]” and the number of the competency will appear. The name you have selected and the email address of this person will be displayed. You may send or cancel the competency review request. Click on one.

Send for approval: This will automatically send an email message to the approving official informing them that this competency is ready for review.

Cancel request: You will be returned to the “Review/Update Competency” screen.

PMCDP FOR

Competency ID = [1.6.2](#)

This function will send an email message to the designated approving official, informing them that this competency is ready for review.

Designated approving official:
Email address:

-
31. If you need additional space to document your request for a waiver, you may choose to enter more information under the “Supporting Information” (click on “PMCDP Menu, Supporting Information”) once you have submitted the waiver request.
-

Review/Update Competencies

Review/Update Competencies

Once you have completed a developmental assignment or training, or you have additional information to input for a competency, you may update it by doing the following.

1. Click on the “PMCDP” menu item.
2. Select “Review/Update Competencies.”
3. Choose a competency to update and click on “Update This Item” or to review a description of the competency, click on the competency number.

To update a developmental need, follow steps 4 – 15 below.

To update an equivalency, follow steps 16 – 27 below.

To update a waiver, follow steps 28 – 39 below.

	Competency ID (click for description)	Competency Status					Justification or Comments
		Developmental Need			Equivalency/ Requirements Met	Waiver	
		Activity Type	Targeted Completion Date	Actual Completion Date			
Update this item	1.1.1	College Course					
Update this item	1.1.2				PMCDP Training		View comments
Update this item	1.1.3				Education & Experience		View comments
Update this item							

4. Changing and / or Submitting a Developmental Need Competency

When the developmental activity or its targeted or actual completion dates has changed, or when you have completed a developmental activity, you must update this information.

5. To choose another status, click the down arrow to the right of the “Select a Status.”
6. Click on “Continue.”

Review/Update Competencies

7. To choose a different activity for “Developmental need,” click the down arrow to the right of “Select a developmental need” and select a different option.

[Text-only menu](#)

PMCDP FOR

Updating competency = [1.4.1](#)
Competency designation selection = Developmental Need

*-Required fields

Competency Status *			Justification or Comments (2000 character limit)
Developmental need	Target Completion Date (mm/yyyy)	Actual Completion Date (mm/dd/yyyy)	
-- Select a developmental need -- -- Select a developmental need -- Certification/License College Course Equivalent Training Course Mentoring On-the-job Training Oral Board Review Other PMCDP Course Rotational Assignment Self Study Written Examination			

SUBMIT

8. **Targeted Completion Date:**

To update, click on the “Targeted Completion Date” field and enter the new date (mm/yyyy).

9. **Actual Completion Date:**

To enter or update the actual completion date of your activity, click on the “Actual Completion Date” field and enter the date (mm/dd/yyyy).

10. **Justification and comments:**

To update your justification or comments, highlight and delete the text you want to change. Insert comments or cut and paste additional information into the comment box.

11. Click on “SUBMIT.”

Review/Update Competencies

12. A summary page with the header “PMCDP for [Your Name]” and the number of the competency, the chosen developmental need, the target date, completion date, and any comments will appear.

PMCDP FOR
Competency ID: 1.1.1
Developmental need:
Target date:
Completion date:
Comments:

[\[Update another competency\]](#) | [\[Submit for approval\]](#)
[\[Re-edit this competency\]](#)

You may choose to update another competency, re-edit this competency, or submit for approval. You should also update your IDP to match these changes.

IDP Update: Click on “IDP” on the top menu, choose “Update current IDP” to process your IDP.

13. **Submit for Approval:**

Click on “Submit for approval.” A screen with the header “PMCDP for [Your Name]” and the number of the competency will appear. Click the down arrow to the right of “Select an approving official” to display a list of names. Choose one.

Choice of an approving official must be in accordance with your program office policy and procedure.

PMCDP FOR
Competency ID = [1.1.1](#)
Please select an approving official for this competency record:

-- Select an approving official --

Continue

-
14. Click on “Continue.”
-

Review/Update Competencies

15. A screen with the header “PMCDP for [Your Name]” and the number of the competency will appear. This is notifying you that an automatic email will be sent to the name/email address you have selected. You may send or cancel the request. Click on one.

PMCDP FOR

Competency ID = [1.6.2](#)

This function will send an email message to the designated approving official, informing them that this competency is ready for review.

Designated approving official:
Email address:

Send for approval: This will automatically send an email message to the approving official informing them that this competency is ready for review.

Cancel request: You will be returned to the “Review/Update Competency” screen.

16. **Changing and/or Submitting an Equivalency**

You may update your equivalency type, the justification/comments, and/or the verification method.

-
17. Click the down arrow to the right of the “Select a Status” field and choose “Designation of Equivalency.”

-
18. Click on “Continue.”
-

Review/Update Competencies

19. A screen displaying your name and the competency number that you are updating, and the “Competency designation selection = Equivalency” will be presented.

In the column “Competency Status,” “Equivalency type” click the down arrow to the right of “Select an equivalency” to display a list of options. Choose one.

PMCDP FOR

Updating competency = [1.6.2](#)
Competency designation selection = Equivalency

*-Required fields

Competency Status *	Justification or Comments (2000 character limit) *	Verification Method *
<i>Equivalency type</i> <div>-- Select an equivalency --</div> <div> -- Select an equivalency -- Education & Experience Experience Oral Exam Other PE or RA License PMCDP Training PMI PMP TQP Certification Training or Education completed Written Exam </div>	<div></div>	<div>-- Select a verification method --</div>
<div>SUBMIT</div>		

20. Update information that supports your request for having equivalent knowledge, skills, and abilities for this competency in the “Justification or Comments” field (2,000 character limit).

21. Update the verification method. Click the down arrow to the right of “Select a verification method” field to view a list of choices. Select a different method.

PMCDP FOR

Updating competency = [1.6.2](#)
Competency designation selection = Equivalency

*-Required fields

Competency Status *	Justification or Comments (2000 character limit) *	Verification Method *
<i>Equivalency type</i> <div>PMCDP Training</div>	<div>FM Systems and Practices in DOE. Completed 07/2004</div>	<div>-- Select a verification method --</div> <div> -- Select a verification method -- Course Completion Certificate Course Evaluation Interview No Documentation Observed On the Job Training Oral Board Position Description Professional Certificate/License Qualifying Official SME Transcript Written Exam </div>
<div>SUBMIT</div>		

Review/Update Competencies

22. Click on “SUBMIT.”

23. A summary page detailing your choices will appear. You can accept these inputs and submit this updated equivalency for approval, edit the information, or update another competency. Click on one option.

PMCDP FOR

Competency ID = [1.6.2](#)

This function will send an email message to the designated approving official, informing them that this competency is ready for review.

Designated approving official:
Email address:

24. **Submit for Approval**

Click on “Send for approval” button.

25. A screen with the header “PMCDP for [Your Name]” and the number of the competency will appear. Click the down arrow to the right of “Select an approving official” to display a list of names. Choose one.

Choice of an approving official must be in accordance with your program office policy and procedure.

[Text-only menu](#)

PMCDP FOR

Competency ID = [1.1.1](#)

Please select an approving official for this competency record:

-- Select an approving official --

Click on “Continue.”

Review/Update Competencies

26. A screen with the header “PMCDP for [Your Name]” and the number of the competency will appear. The name you have selected and the email address of this person will be displayed. You may send for approval or cancel the competency review request. Click on one.

PMCDP FOR

Competency ID = [1.6.2](#)

This function will send an email message to the designated approving official, informing them that this competency is ready for review.

Designated approving official:
Email address:

-
27. **Submit for approval**

Click on “Send for approval” button.

-
28. **Changing and/or Submitting a Waiver**

From the Competency Screen, click on “Update this item” for the applicable competency.

-
29. Click the down arrow to the right of “Select a status” to display a list of options. Choose “Waiver.”

-
30. Click “Continue.”

-
31. A screen with the header “PMCDP for [Your Name]” and the number of competency will appear. Update the justification in the box provided (2,000 character limit).

-
32. Click on “Submit.”

-
33. A summary page detailing your choices will appear. An authorized approving official must approve a waiver request. You can accept these inputs and submit this waiver for approval, edit the information, or update another competency. Click on one option.

-
34. Click on “Submit for approval” button.
-

Review/Update Competencies


35. A screen with the header “PMCDP for [Your Name]” and the number of the competency will appear. Click the down arrow to the right of “Select an approving official” to display a list of names. Choose one.

[Text-only menu](#)

PMCDP FOR

Competency ID = [1.1.1](#)

Please select an approving official for this competency record:

-- Select an approving official -- 

Choice of an approving official must be in accordance with your program office policy and procedure.

-
36. Click on “Continue.”

-
37. A screen with the header “PMCDP for [Your Name]” and the number of the competency will appear. The name you have selected and the email address of this person will be displayed. You may send for approval or cancel the competency review request. Click on one.

PMCDP FOR

Competency ID = [1.6.2](#)

This function will send an email message to the designated approving official, informing them that this competency is ready for review.

Designated approving official:
Email address:

-
38. Click on “Send for approval” button.

-
39. If you need additional space to document your request for a waiver, you may choose to enter more information under the “Supporting Information” (click on “PMCDP Menu, Supporting Information”) once you have submitted the waiver request.
-

Reports

There are four participant reports associated with the PMCDP. These reports are:

- Supervisor/Site Review Report
- Competency Status Report
- Equivalency Summary Report
- Waiver Summary Report

Supervisor/Site Review Report is designed to be used by program/site offices and the PMCDP Certification Review Board to document completion of competency requirements for certifying federal project directors in the U.S. Department of Energy.

Competency Status Report displays the status of all competencies. It details the status of a competency in the approval process.

Equivalency Summary Report displays a list of all competencies for which an equivalency was requested and the approval status.

Waiver Summary Report displays a list of all competencies for which a waiver was requested and the approval status.

To view a report, after logging into ESS do the following.

-
1. Click on the “PMCDP” menu item at the top of the page.
-
2. Select “Supervisor/Site Review Report” or Competency Status Report” or “Equivalency Summary Report” or “Waiver Summary Report.”
-

Certification Request

When all competencies have been approved for a level, certification for that level should be requested. After logging into ESS, to request certification:

-
1. Click on the “PMCDP” menu item.
 2. Select “Certification Request Form.”
 3. If you have not qualified to request a level of certification or all of your competencies have not been approved by your designated approving official, you will be show a screen requesting you to review your competency status report.
-

PMCDP CERTIFICATION REQUEST FORM FOR

You have not qualified to request any level of certification or your competencies have not yet been approved by your Designated Approving Official. Please review your competency status report.

-
4. You will be presented with a screen requesting the designation of your approving officials. Depending upon your site’s procedures, you may only be required to submit your request to your first level manager and field/site manager.

PMCDP CERTIFICATION REQUEST FORM FOR

Name:

Title:

Organization:

Level of certification requested:

PM Level 1

Your first level manager (**required**):

– Select your manager –

Your second level supervisor
(optional):

– Select your manager –

Your third level supervisor (optional):

– Select your manager –

Your overall site/office manager
(**required**):

– Select your overall site/office manager –

Submit for approval

Cancel request

Certification Request

5. Select the level of certification requested. Click the down arrow to the right of “Level of certification requested.” Choose one.
PM Level 1: Responsible for projects with TPC between \$5M and \$20M.
PM Level 2: Responsible for projects with TPC between \$20M and \$100M.
PM Level 3: Responsible for projects with TPC between \$100M and \$400M.
PM Level 4: Responsible for projects with TPC exceeding \$400M.

6. Click the down arrow to the right of the “Your first level manager” field to display a list of DOE personnel names. Select one name.

7. Click the down arrow to the right of the “Your second level manager” field to display a list of DOE personnel names. Select one name, if applicable.

8. Click the down arrow to the right of the “Your third level manager” field to display a list of DOE personnel names, if applicable. Select one name.

9. Click the down arrow to the right of the “Your overall site/office manager” field to display a list of DOE personnel names. Select one name.

10. Click on “Submit for Approval” or “Cancel request.”

11. A screen will appear summarizing your certification request, the persons who are being contacted, the order in which they will be contacted, and the final action (notification of their approval or disapproval).

PMCDP FOR

Your request for Level Three certification approval has been sent to all program officials listed on this confirmation page. Once the site/office manager approval has been obtained, the Program Secretarial Official (PSO) should be notified that you are ready to be presented to the PMCDP Certification Review Board for review. Most PSOs require notification. If your PSO does not require such notification, you will select "No program official (PSO) notification/review required". Enter ESS, PMCDP module and select "PSO Certification/Review Request Form" from the menu.

Name:

Program Official #1:

Program Official #4:

[Return to PMCDP Start Page](#)

12. An electronic message will be sent to the approving officials selected notifying them of your certification request.
-

PSO Certification Request Review

Once the site/office manager approval has been obtained, the PSO should be notified that you are ready to be presented to the PMCDP Certification Review Board for review. Most PSOs require notification. If your PSO does not require such notification, you will select “No program official (PSO) notification/review required.”

1. Click on the “PMCDP” menu item.
2. Select “PSO Certification/Review Request Form.”
3. You will be presented with a screen titled “PMCDP PSO Certification/Review Requests for [your name].” Click on “Submit a new request.”

[Text-only menu](#)

PMCDP PSO CERTIFICATION/REVIEW REQUESTS

You have not entered any requests for PSO certification.

[Submit a new request](#)

4. A screen with your name, title and organization will be presented. You must either complete the requested program contact information or select “No program official (PSO) notification/review required.”

PMCDP PSO CERTIFICATION/REVIEW REQUEST FORM

INSTRUCTIONS: Once site/office approval has been obtained, your Program Secretarial Official (PSO) should be notified that you are ready to be presented to the PMCDP Certification Review Board for review. Most PSOs require notification. If your Program Official (PSO) does not require such notification, select “No Program Official (PSO) notification/review required” below. OEMC will automatically be notified that you are requesting certification review without Program Secretarial Official (PSO) participation.

*-Required field

Name:
Title:
Organization:

Level of certification requested: *

Program Official #1: *

Program Official #2 (optional):

Program Official #3 (optional):

Program Official #4: *

☐ No Program Official (PSO) notification/review required

PSO Certification Request Review

-
5. As you did when you requested certification approval, select the level of certification requested. Click the down arrow to the right of “Level of certification requested.” Choose one.

PM Level 1: Responsible for projects with TPC between \$5M and \$20M.

PM Level 2: Responsible for projects with TPC between \$20M and \$100M.

PM Level 3: Responsible for projects with TPC between \$100M and \$400M.

PM Level 4: Responsible for projects with TPC exceeding \$400M.

6. Select up to four program officials to review your certification package. You must select at least two individuals, one of which must be the individual who has final approval PMCDP certification request authority for the program office.
-

7. If your PSO does not require such notification, select “No program official (PSO) notification/review required.”
-

8. Click on “Submit for approval”, “Cancel request”, or “Clear changes.”
-

9. You will be presented with a screen titled “PMCDP for [you name].” Your name and those of the program officials you have chosen will be listed in the order they were chosen.

PMCDP FOR

Your request for Level One certification approval has been sent to all program officials listed on this confirmation page. Once all of the program officials have approved your request, the request is then sent to OECM for final approval.

Name:
Program Official #1:
Program Official #4:

[Return to PMCDP Start Page](#)

10. You may return to the PMCDP start page by clicking on “Return to PMCDP Start Page.”
-

11. Once your PSO has completed it’s review and approved your certification request, you will receive an electronic message of their decision to approve or disapprove your request.

From: Administration, PMCDP Sent:
To:
Cc:
Subject: PMCDP PSO Certification Request

To:

Your PSO certification request has been approved by all of your selected Program Officials. The Office of Engineering and Construction Management (OECM) has been notified of your request.

Original request date:

Approved by program official 1, on

Approved by program official 4, on

PSO Certification Request Review

12. OECM will be notified of your completed certification review.

PMCDP PSO CERTIFICATION/REVIEW REQUEST FORM

OECM has been notified of your request for certification review by the PMCDP Certification Review Board.

[Return to the PMCDP start page](#)

-
13. You may review the status of all certification request actions by clicking on “PSO Certification/Review Request Form.” You will be presented with a table listing your request date, the level requested, and the actions taken to date. You may submit a new request by clicking on “Submit a new request.”

PMCDP PSO CERTIFICATION/REVIEW REQUESTS FOR

Request Date	Level Requested	Program Official Review Required	Level 1 Manager Approval Status	Level 2 Manager Approval Status	Level 3 Manager Approval Status	Level 4 Manager Approval Status
09/22/2005	Level One	Yes	Approved	Not selected by user	Not selected by user	Approved

[Submit a new request](#)

-
14. OECM will begin its independent review of the certification package and notify the PSO of a date for CRB review and/or interview. You will be contacted your PSO for final details.
-

Continuing Education Hour Request

Refer to O361.1A, Chapter IV for guidance on CE hours.

After logging into ESS, to request credit for having obtained a CE hour(s):

1. Click on the “PMCDP” menu item.
2. Select “CE Request Form.” You will be presented with a screen that states that the database has no previous CE hour requests on file.

PMCDP CEU REQUEST STATUS REPORT FOR

You do not have any CEU requests in the database.

[Add a new request](#)

3. Select “Add a new request.”
4. A screen will be presented that requires you to choose a CE hour category, the number of CE hours requested, the dates of the activity, a title (if applicable), course number (if applicable), provider, and course description (if applicable).

PMCDP CONTINUING EDUCATION HOUR REQUEST FORM

Instructions: CE hour requests must be approved by your first line and site manager. This request will be automatically sent to the persons you identified as first line manager and site manager in your profile. If either of these persons has changed since your initial profile entry, please update this information before submitting a CE hour request.

[Continuing education units conversion table](#)

*-Required fields

Name:	
CEU category: *	<input type="text" value="--Select a category--"/>
Number of CEUs requested: *	<input type="text"/>
Dates earned (mm/dd/yyyy format): *	From: <input type="text"/> To: <input type="text"/>
Title: *	<input type="text"/>
Course number:	<input type="text"/>
Provider:	<input type="text"/>
Course Description:	<input type="text"/>
<input type="button" value="Submit request"/> <input type="button" value="Clear form"/>	
<input type="button" value="Exit without saving"/>	

(Continued on next page)

Continuing Education Hour Request

Click the down arrow to the right of the “CE Category” field to display a list of choices. Select one.

- Academic course at an accredited college or university
- Audited academic course at an accredited college or university
- DOE training
- Educational portion of technical meeting, conference, workshop, and seminar
- Focused training/short course by commercial vendor
- Instructing at an at an accredited college or university
- Presentation at workshop, conference or seminar

5. Enter the number of CE hours in the “Number of CEs Requested” field.

Training/continuing Education (CE) Opportunity Description	Unit = DOE CE Credit
Educational portions of technical meetings, conferences, workshops, and seminars; DOE training; and focused training and short courses provided by commercial vendors.	1 hour = 1 CE hour
Academic courses at an accredited college or university.	1 semester credit = 15 CE hours 1 quarter credit = 9 CE hours
Audited academic courses at an accredited college or university.	1 semester credit = 5 CE hours 1 quarter credit = 4 CE hours
Presentations at workshops, conferences, and seminars.	1 formal presentation = 5 CE hours
Instructing at an accredited college or university.	1 semester credit = 10 CE hours 1 quarter credit = 4 CE hours

6. Enter the date earned in the “From” field and “To” field (mm/dd/yyyy).

7. Enter the title of the course, conference, etc. in the “Title” field if appropriate.

Continuing Education Hour Request

-
8. Enter the course number in the “Course Number” field, if applicable.

 9. Enter the name of the provider in the “Provider” field.

 10. Enter a description of the course, learning objectives, and outcomes in the “Course Description” field. Please provide as much detailed information as possible.

 11. Click on “Submit request,” “Clear form,” or “Exit without saving.”

 12. A screen will be presented that confirms your CE request to OECM. It details the category, title, number of CE hours requested, CE hours approved, the approval date and approval official’s name.

To make another CE request, click on “Add a new request,” and repeat steps 4-12 of this section.

PMCDP CE REQUEST STATUS REPORT FOR

Your request has been sent to your manager(s) for approval.
[Add a new request](#)

Category	Title	CEs Requested	Request Date	Line Manager Approval Date	Site Manager Approval Date	OECM Approval Date	CEs Approved
DOE Training	vvvvvvvv	2	10/07/2005				

-
13. Once your CE hour request has been acted upon by your line manager and your site/office manager, you will receive electronic messages notifying you of the result.

From: Administration, PMCDP
Sent:
To:
Subject: PMCDP CE Hour Request approved

Your CE hour request has been approved by your line manager,

Approver's comments: Approved.

From: Administration, PMCDP
Sent:
To:
Subject: PMCDP CE Hour Request approved

Your CE hour request has been approved by your site manager,

Approver's comments: *None provided*

(Continued on next page)

Continuing Education Hour Request

From: Administration, PMCDP
Sent:
To:
Cc:
Subject: PMCDP CE Hour Request Approved
Importance: High

To

Your request for CE hours has been approved by your first line and/or site manager. The Office of Engineering and Construction Management (OECM) has been notified of your request for CE hours. Final approval by OECM is required for CE hours to be accepted for biennial continuing education requirements.

Original request date:

Category:

Title:

Dates earned from/to:

CE hours requested:

Activity description:

Approved by line manager on

Approved by site manager on

To: OECM/PMCDP Administrator

To approve/disapprove this request:

- Login to your ESS account at
- Go to the PMCDP menu and click on "Approve/Review CE Hour Requests" under the "Approving Official Options"

14. OECM will review your request and either approve, disapprove or place it on hold.

Continuing Education Hour Request

15. If your request is approved by OECM, you will receive an electronic message giving you the results of their determination.

From: PMCDP.Administrator@hq.doe.gov

Sent:

To:

Cc: PMCDP.Administrator@hq.doe.gov

Subject: PMCDP CE hour request approved

Importance: High

To:

OECM has approved your CE hour request in Employee Self Service.

Request date:

Category:

Title:

Dates earned from/to:

CE hours requested:

CE hours approved:

Activity description:

Comments from OECM administrator:

16. If your request is denied by OECM, you will receive an electronic message giving you further instructions.

From: PMCDP.Administrator@hq.doe.gov

Sent:

To:

Cc: PMCDP.Administrator@hq.doe.gov

Subject: PMCDP CE hour request disapproved

Importance: High

To:

OECM has not approved CE hour request in Employee Self Service. Please contact OECM to arrange for discussion on the issues.

Request date:

Category:

Title:

Dates earned from/to:

CE hours requested:

CE hours approved:

Activity description:

Comments from OECM administrator:

Continuing Education Hour Request

17. If your request has been placed on hold, you will receive an electronic message giving you further instructions.

From: PMCDP.Administrator@hq.doe.gov

Sent:

To:

Cc: PMCDP.Administrator@hq.doe.gov

Subject: PMCDP CE hour request placed on hold

Importance: High

To:

OECM has placed your CE hour request on hold and will be in contact with you shortly.

Request date:

Category:

Title:

Dates earned from/to:

CE hours requested:

CE hours approved:

Activity description:

Comments from OECM administrator:

Approving Official**Review and Approval of Competency**

1. Once you have received an e-mail stating that a certification request is ready for your review and approval on ESS, log into ESS.
2. Click on the “PMCDP” menu item.
3. Select “Review/approve employee competency.”
4. A screen with a table listing all employees who have chosen you, as the certifying official will be presented. The table listing is presented alphabetically by the employee’s last name. Also listed are the competency number being addressed, the current status, and date of the employee’s initial request for approval, the action taken, and the date of final approval of the competency.

Click on any of the links below to view the details for each employee. Click on any of the linked column titles to sort the table accordingly. The table is sorted by whichever column title is displayed in **red**.

<u>Name</u>	<u>Competency</u>	Status	<u>Date of Employee's Initial Request</u>	Action	<u>Date of Final Approval</u>
	1.9.1	<i>Approval Requested</i>	12/29/2004	Change status	
	3.11.A.4	<i>Approval Requested</i>	11/10/2004	Change status	
	1.1.2	<i>Approval Requested</i>	03/25/2004	Change status	

This table can be sorted by clicking on the category title:

- Name
- Competency
- Date of Employee’s Initial Request
- Date of Final Approval

The category title will turn red indicating that you have sorted the table by this category. To take action on a request, click on “Change status.”

Review and Approval of Competency (continued)

5. Click the down arrow to the right of the “Select a status” field to display a list of choices. Select the appropriate choice.

“Approved”

“Pending”

“Disapproved”

PMCDP - Employee Summary

Designated Approving Official:

NOTE: clicking on the SAVE button will save the status selected. Email will be sent to the employee notifying them of approval status. If this competency is disapproved, entry is required in the 'Comments' field.

Employee being evaluated:

Competency being evaluated: [1.2.1](#) | Competency Level: PMI

Designation: **Equivalency - Education & Experience**

Employee's justification: I have a considerable training in this area. I took "Managing Project Well" and "Project Leadership Workshop." Both courses emphasize the human side of project management - team building, effective leadership, etc.

Select Status: *

Approved
 -- Select a status --
 Approved
 Disapproved
 Pending

Comments: *

* -Required field

-
6. If a competency is disapproved, entry is required in the “Comments” field. OECM encourages the approving official to enter comments for any status selection as a form of documentation regarding their decision.
-
7. Click on the “Submit” button.

Note: An email notice will be sent to the next level manager (if chosen), as applicable, informing them that a certification request is ready for their review and approval.

Review and Approval of Certification Request

1. When an employee has completed all the core competencies for a level, an email will be sent to you notifying you that they are applying for certification. Log into ESS, select “Review/Approve Certification Level Request.”
2. A PMCDP Certification Request Summary will be presented, listing all employees who have chosen you, as the certifying official will be listed. The table will list the employees by last name, the certification level requested, the current status, date of the employee’s initial request for approval, the action taken, and the date of final approval of the competency.

Click on any of the links below to view the details for each employee. Click on any of the linked column titles to sort the table accordingly. The table is sorted by whichever column title is displayed in **red**.

Name	Cert Level Requested	Status	Date of Employee's Initial Request	Action	Date of Final Approval
	PM2	<i>Approval Requested</i>	09/15/2003	Change status	
	PM1	<i>Approval Requested</i>	02/03/2004	Change status	

This table can be sorted by name, competency, date of employee’s initial request, or the date of the final approval by clicking on the title. The title will turn red indicating that you have sorted the table by this category. To take action, click on “Change Status.”

Review and Approval of Certification Request (continued)

3. Click the down arrow to the right of the “Select Status” field to display a list of choices. Select the appropriate choice.

“Approved”

“Pending”

“Disapproved”

If a competency is disapproved, an entry is required in the “Comments” field.

It is recommended that comments be made if you choose “pending” to delineate the issue(s) and an anticipated resolution date.

PMCDP - Set certification status

Manager:

NOTE: clicking on the SAVE button will save the status selected. Email will be sent to the employee notifying them of approval status. If this competency is disapproved, entry is required in the 'Comments' field.

Employee being evaluated: PM1
 Certification level requested: [Click to view](#)
 Employee's competency status report: [Click to view](#)
 Field/site manager's name/comments:

Select Status: *

Comments: *

*-Required field

You may enter comments no matter what status is chosen.

4. To enter comments, choose the “Menu” at the top of the screen. From the drop down list, choose “Enter General Comments” from the “Approving Official/Manager Options” list. You will be presented with a screen where you can select the applicable individual. This drop down list will only contain the names of those individuals who have chosen you as their approving official.

Enter general comments for an employee

INSTRUCTIONS: First Line Manager and/or Site Manager may enter comments that will appear in the "General Comments" section at the bottom of the first page of the Supervisory/Site Review Participant Profile. Select an employee from the drop-down list below to continue.

Review and Approval of Certification Request (continued)

5. You will be presented with a screen that has a text box for you to type in your comments (2000 character limit).

Once you are finished, click on “Save Changes.” These comments will be added to the “General Comments” section at the bottom of the first page of the Supervisory/Site Review Participant Profile.

Enter general comments for

INSTRUCTIONS: First Line Manager and/or Site Manager may enter comments that will appear in the "General Comments" section at the bottom of the first page of the Supervisory/Site Review Participant Profile (2000 character limit).

Click on "Save Changes" to save your data.

6. You will be presented with a screen confirming your action. You may return to the profile and review your inputs by clicking on “Click here to view this participant’s profile report.”

Enter general comments for

The text you entered has been saved.

[Click here to view this participant's profile report](#)

This completes your ESS actions for this profile unless additional and/or clarifying information is requested from the federal project director based upon additional PSO and/or OECM reviews.

CE Hour Review and Approval

1. When an electronic message is received notifying you that one of your PMCDP participants is requesting CE hour approval through ESS, you must review the request and approve, disapprove, or put the request on hold. This process does not require you to log on to ESS.

From:
Sent:
To:
Subject: PMCDP request for CEU approval
Importance: High

To:

has made the following request for CE approval through
Employee Self Service (ESS):

Category:

Title:

Dates earned from/to:

CEUs requested:

Activity description:

To review this request, click on the following link to approve or disapprove the request

http://misdev2.hr.doe.gov/ess/secure/PMCDP_CEU_approval_form

A URL hyperlink will be embedded into the notification email. Click on the hyperlink to access the one page approval form. You are required to enter your ESS password for security purposes.

CE Hour Review and Approval (continued)

2. Once you have approved, disapproved or put on hold the CE hour request, an electronic message will be sent to the certified federal project director and OECM notifying them of this action.

From: Administration, PMCDP

Sent:

To:

Cc:

Subject: PMCDP CE Hour Request Approved

Importance: High

To

Your request for CE hours has been approved by your first line and/or site manager. The Office of Engineering and Construction Management (OECM) has been notified of your request for CE hours. Final approval by OECM is required for CE hours to be accepted for biennial continuing education requirements.

Original request date:

Category:

Title:

Dates earned from/to:

CE hours requested:

Activity description:

Approved by line manager on

Approved by site manager on

To: OECM/PMCDP Administrator

To approve/disapprove this request:

- Login to your ESS account at

Go to the PMCDP menu and click on "Approve/Review CE Hour Requests" under the "Approving Official Options"

3. OECM will take the final action on approval of the CE hour request and notify the approving official and certified federal project director if their determination is different from the request.
-

PSO Certification/Review Approval

1. When an electronic message is received notifying you that one of your PMCDP participants is requesting certification through ESS, you must review the request and approve, disapprove, or put the request on hold. This process does not require you to log on to ESS. Click on the electronic hyperlink located at the bottom of the notification email or contact the PMCDP administrator as directed.

From: Sent:
To:
Cc:
Subject: PMCDP request for PSO certification review approval

To:

Your PMCDP participant, , is requesting PMCDP certification through Employee Self Service (ESS):

Certification level requested:

To review this request, click on the following link to approve or disapprove the request.

If you have additional questions regarding this request, please contact the PMCDP administrator at PMCDP.Administration@hq.doe.gov

http://misdev2.hq.doe.gov/ess/secure/PMCDP_PSO_approval_form.cfm?

-
2. You will be presented with the “PMCDP PSO Notification/Review Approval Form.”

PMCDP PSO Notification/Review Approval Form

Please review the information presented in the request below and either approve, disapprove or keep the request on hold by clicking on the appropriate button at the bottom of this page. Final-approval of the request is at the discretion of OECM.

Your ESS password is required. A 'Comment/Reason' is required when disapproving the request.

Approver:

Requestee's name:

Request date:

Certification level requested:

ESS Password

Comment/Reason

[Click here to view this participant's profile report](#)

(Continued on next page)

PSO Certification/Review Approval (continued)

Your ESS password is required for you to take action on this request. The following information will be listed

- Names of the certification candidate
 - Approving official (site/office manager)
 - Request date
 - Certification level requested
-

3. Enter your ESS password. If you wish to review the participant's profile, click on the jump site "Click here to view this participant's profile report." Once you have completed your review, you must approve, disapprove or put this request on hold. Choose one option.
-
4. Once you have approved the certification request, you will be presented with a screen confirming your action. An electronic message will be automatically sent to OECM notifying them of this approval. OECM will begin its review for presentation to the Certification and Review Board.

PMCDP PSO Certification Approval Form

**You have approved the PSO certification request.
OECM has been notified of this PSO certification approval.**

Close window

END OF TUTORIAL

For additional information contact the PMCDP Administrator at PMCDP.Administrator@hq.doe.gov